

Screen Description:

The Contacts Screen contains ten views that are dedicated to entering, displaying, and using contact data. The first three views focus specifically on contact information. The rest of the views provide the ability to create activities related to specific contacts, attach files such as customer documentation to the contact, create notes about an contact, view cases associated with the contact, view contacts associated with the contact view loans associated with the contact, and monitor contact metrics via the charts section.

Following is a list of the views that comprise the Contact Screen. More details for each view are available in the subsequent pages of this document.

- My Contacts
- My Team's Contacts
- All Contacts
- Activities
- Attachments
- Notes
- All Customers
- All Partners
- Cases
- Charts

My Contacts View

The screenshot displays the Siebel 'My Contacts View' interface. The top section shows a list of contacts with columns: Contact Type, Relationship/Title, Account, First Name, Last Name, Suffix, and M. The bottom section is a form for editing a contact, with fields for Contact, Phone Numbers, Availability, Address, and Email.

Contact Type	Relationship/Title	Account	First Name	Last Name	Suffix	M
Customer	Borrower	324-55-9848	Robert	Brooks		M
Third Party	Borrower's Parent/Guardian	324-55-9848	Daniel	Jordan		C
Customer	Borrower	324-55-9848	Jessica	Jordan		
Customer	Not Given	Not Given	Tom	Leah		
Customer	Borrower	324-55-9848	Steven	Oveman		
Partner	Special Case Contact	Siebel	Bob	Stone		A

The bottom section is a form for editing a contact. It includes fields for Contact, Phone Numbers, Availability, Address, and Email. The form is divided into several sections: Contact, Phone Numbers, Availability, Address, and Email. The Contact section includes fields for Last NM, First NM, Preferred, Type, Relationship/Title, and Account. The Phone Numbers section includes fields for Country Code, Home, Work, Fax, and Mobile. The Availability section includes fields for Hours, Method, and Special Note/ONE. The Address section includes fields for Street, City, State, Zip, and Country. The Email section includes fields for 1st and 2nd email addresses.

View Description:

This view's primary purpose is to allow quick searches for specific contacts for the individual user, to display full details for a particular contact while viewing a list of his/her contacts, and for the user to enter a new contact.

OCTS Contact List Applet: *top half of view*

The list applet allows the user to scroll through a list of all contacts, or to select a subset of contacts to view by using the query feature. To facilitate efficient work on a contact, hyperlinks in some fields provide quick navigation to a different screen/view to provide detailed account or contact information.

For a detailed data mapping please refer to Appendix B-7

OCTS Contact Form Applet: *bottom half of view*

The form applet displays all pertinent contact information for a given contact in a single, scroll-free display. The data displayed is that of the active contact in the list applet above (the selected contact with the red arrow in left-most column). A "New" button quickly creates a new contact, and the form applet provides an intuitive, efficient method of contact data entry.

For a detailed data mapping please refer to Appendix B-8

